



# Department of Defense INSTRUCTION

NUMBER 1300.20

December 20, 1996

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USD(P&R)

SUBJECT: DoD Joint Officer Management Program Procedures

- References: (a) [DoD Directive 1300.19](#), "DoD Joint Officer Management Program,"  
(b) Sections 155, 164, 611, 612, 617 - 619a, 628, and 661 - 668 of title 10, United States Code  
(c) Chairman of the Joint Chiefs of Staff Instruction 1330.02, "Review of Promotion Selection Board Results by the Chairman of the Joint Chiefs of Staff," January 7, 1994  
(d) DoD 8910.1-M, "DoD Procedures for Management of Information Requirements," November 28, 1986, authorized by DoD Directive 8910.1, June 11, 1993  
(e) through (m) see enclosure 1

## 1. PURPOSE

This Instruction:

1.1. Implements policy, assigns responsibilities, and prescribes procedures under reference (a) for implementation of the DoD Joint Officer Management Program for active duty list officers.

1.2. Implements Sections 155, 164, 611, 612, 617 - 619a, 628, 661 - 665, and 667 - 668 of reference (b).

## 2. APPLICABILITY AND SCOPE

This Instruction applies to:

2.1. The Office of the Secretary of Defense (OSD), the Military Departments, the

Chairman of the Joint Chiefs of Staff, the Combatant Commands, the Inspector General of the Department of Defense, the Defense Agencies, and the DoD Field Activities. The term "Military Services," as used herein, refers to the Army, the Navy, the Air Force and the Marine Corps.

## 2.2. U.S. Elements of Combined Commands.

### 3. DEFINITIONS

Terms used in this Instruction are defined in enclosure 2.

### 4. POLICY

It is DoD policy under DoD Directive 1300.19 (reference (a)) that a DoD Joint Officer Management Program be established to enhance the joint experience and perspective of future military leaders to improve the U.S. joint war fighting capability.

### 5. RESPONSIBILITIES

5.1. The Assistant Secretary of Defense for Force Management Policy, under the Under Secretary of Defense for Personnel and Readiness, shall monitor compliance with this Instruction and reference (a).

5.2. The Deputy Under Secretary of Defense for Requirements and Resources, under the Under Secretary of Defense for Personnel and Readiness, shall initiate regulations, policies, and procedures to otherwise comply with this Instruction.

5.3. The Chairman of the Joint Chiefs of Staff shall initiate regulations, policies and procedures to otherwise comply with this Instruction.

5.4. The Secretaries of the Military Departments shall initiate regulations, policies and procedures to otherwise comply with this Instruction.

5.5. The Director of Administration and Management, Office of the Secretary of Defense; the Chairman of the Joint Chiefs of Staff; the Commander in Chiefs of the Combatant Commands; Directors of Defense Agencies under OSD Principal Staff Assistants and those that report directly to the Secretary or Deputy Secretary of Defense; and the Directors of the DoD Field Activities shall ensure compliance with this Instruction.

## 6. PROCEDURES

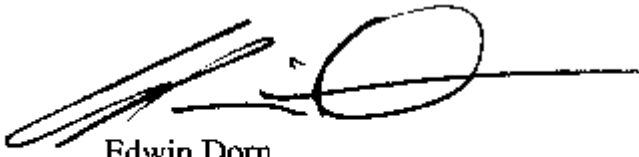
Procedures for implementing and maintaining the DoD Joint Officer Management Program are in enclosures 3 through 13.

## 7. INFORMATION REQUIREMENTS

The DoD internal reporting requirements referred to in this Instruction, described in the enclosures, and further defined in Chairman of the Joint Chiefs of Staff Instruction 1330.02 (reference (c)) have been assigned Report Control Symbol DD-JCS(AR)2003, in accordance with DoD 8910.1-M (reference (d)).

## 8. EFFECTIVE DATE

This Instruction is effective immediately.



Edwin Dorn  
Under Secretary of Defense for  
Personnel and Readiness

Enclosures - 13

1. References
2. Definitions
3. Joint Duty Assignments (JDAs)
4. Joint Duty Credit
5. Tour Length Requirements and Early Releases
6. Joint Specialty Officers (JSOs) and JSO Nominees
7. Critical Occupational Specialties
8. General and Flag Officer Provisions
9. Promotion Requirements
10. Professional Military Education
11. Report Requirements
12. Joint Duty Credit for Operations DESERT SHIELD and DESERT STORM
13. Joint Duty Credit for Certain Joint Task Force Assignments

E1. ENCLOSURE 1

REFERENCES, continued

- (e) Chairman of the Joint Chiefs of Staff Chairman Instruction 1800.01-96, "Officer Professional Military Education Policy," March 1, 1996
- (f) DoD Directive 5000.52, "Defense Acquisition Education, Training, and Career Development Program," October 25, 1991
- (g) DoD Instruction 5000.55, "Reporting Management Information on DoD Military and Civilian Acquisition Personnel and Positions," November 1, 1991
- (h) DoD Directive 5000.57, "Defense Acquisition University," October 22, 1991
- (i) DoD Instruction 5000.58, "Defense Acquisition Workforce," January 14, 1992
- (j) DoD 5000.52-M, "Acquisition Career Development Program," November 1995, authorized by DoD Directive 5000.52, October 25, 1991
- (k) DoD Directive 1315.7, "Military Personnel Assignments," January 9, 1987
- (l) Chairman of the Joint Chiefs of Staff Instruction 1331.01, "Manpower and Personnel Actions Involving General/Flag Officers," January 31, 1995
- (m) [DoD Directive 1320.12](#), "Commissioned Officer Promotion Program," October 30, 1996

## E2. ENCLOSURE 2

### DEFINITIONS

E2.1.1. Assignment. The position in an organization to which an officer permanently belongs for manpower accounting purposes. Temporary duty (TDY) with other organizations does not alter the officer's permanent assignment status.

E2.1.2. Combatant Command Positions. A category of positions defined by the Chairman of the Joint Chiefs of Staff. Incumbents of those positions are responsible for unified command and control of combat operations or operations other than war.

E2.1.3. Critical Joint Duty Assignment (JDA). Designation of a "JDA position" for which, considering the duties and responsibilities of the position, the incumbent should be previously experienced and educated in joint matters, or at a minimum, the position would be greatly enhanced by such an incumbent. Critical positions are not necessarily the most key and essential billets in an activity. Critical positions are proposed by heads of joint activities, approved by the Assistant Secretary of Defense for Force Management Policy (ASD(FMP)) with the advice and assistance of the Deputy Under Secretary of Defense for Requirements and Resources (DUSD(R&R)) and the Chairman of the Joint Chiefs of Staff, and documented in the JDAL. Critical positions are filled by Joint Specialty Officers unless waived by the Chairman of the Joint Chiefs of Staff.

E2.1.4. Critical Occupational Specialty (COS). A military occupational specialty designated by the ASD(FMP) from among the combat arms in the Army or equivalent military specialties in the Navy, the Air Force, and the Marine Corps (see enclosure 7) and a severe shortage of trained officers in that skill exists. Equivalent military specialties are those engaged in the operational art to attain strategic goals in a theater of conflict through the design, organization, and conduct of campaigns and major operations. COS provisions do not apply to GFOs.

E2.1.5. Direct Entry Students. An officer, neither a graduate from an accredited and/or certified PJE Phase I course of instruction nor a Phase I equivalency program, who is allowed to attend PJE Phase II by a Chairman of the Joint Chiefs of Staff waiver.

E2.1.6. Grade. The grade at which the officer is paid. It does not include frocked or promotion select status.

E2.1.7. Joint Duty Assignment (JDA). An assignment to a designated position in a multi-Service or multi-national command or activity that is involved in the integrated employment or support of the land, sea, and air forces of at least two of the three Military Departments. The preponderance of the officer's duties involves producing or promulgating national military strategy, joint doctrine, joint policy, strategic plans or contingency plans, or to commanding and controlling operations under a combatant command. Assignments in an officer's own Military Department or assignments for joint education or joint training or to overstrength and/or temporary positions are not covered by this definition. Medical officers, dental officers, veterinary officers, medical service officers, nurses, biomedical science officers, chaplains, and judge advocates may not be assigned to a JDA position. The joint positions designated for such officers are excluded from this definition regardless of the position description.

E2.1.8. Joint Duty Assignment List (JDAL). A consolidated list of JDAs approved by the ASD(FMP). Positions held by GFOs and critical JDAs are shown separately.

E2.1.9. Joint Duty Assignment Management Information System (JDAMIS). The automated management information system data base managed by the Chairman of the Joint Chiefs of Staff and maintained by the Defense Manpower Data Center, and updated by the Chairman of the Joint Chiefs of Staff and the Military Services. Joint activities that do not have JDAMIS update capability keep the Military Services informed of changes that affect JDAMIS. JDAMIS supplements existing Military Service manpower and personnel information systems by providing automated files reflecting the approved JDAL and personnel data on officers who are JSOs or JSO nominees and other officers who have served or are serving in JDA positions or have completed or are attending PJE. Current and historical data files in JDAMIS are used to manage, analyze, and oversee the Joint Officer Management Program and are used to prepare the "Goldwater-Nichols Act Implementation Report Annex to the Secretary of Defense Annual Report to the President and the Congress."

E2.1.10. Joint Duty Credit.

E2.1.10.1. Full joint duty credit is the joint credit designation granted for the completion of a tour, or accumulation of tours, of duty in a JDA that meets all statutory requirements.

E2.1.10.2. Cumulative joint duty credit is the joint credit designation granted

for continuous time served in a JDA of at least 10 months, but less than the duration needed to qualify for full joint duty credit (see enclosure 4) or for periods of qualifying service in a qualifying JTF headquarters temporary assignment (see enclosure 13).

E2.1.11. Joint Matters. Matters relating to the integrated employment of land, sea, and air forces, including matters relating to national military strategy, strategic and contingency planning, and command and control of combat operations under a combatant command.

E2.1.12. Joint Specialty Officer (JSO). An officer designated by the Secretary of Defense, with the advice and assistance of the Chairman of the Joint Chiefs of Staff, who is educated and trained in joint matters and has completed the requirements for “JSO” designation.

E2.1.13. “JSO” Designation Board. An administrative board convened by the Secretary of a Military Department to consider officers in grades O-6 and below for recommendation to the Secretary of Defense for designation as “JSOs.” “JSO” Designation Boards may be convened to recommend GFOs for “JSO” designation.

E2.1.14. JSO Nominee. An administrative classification of an officer (grade O-3 or higher) assigned to a JDA or who has completed a full tour of duty in a JDA, nominated by the Secretary of a Military Department as a JSO nominee. To be nominated as a JSO nominee the officer must have successfully completed a Program for Joint Education (PJE) or possess a COS.

E2.1.15. Organizational Positions. A category of positions (e.g., Defense Agency positions) not included in the Office of the Secretary of Defense, the Chairman of the Joint Chiefs of Staff, or the Combatant Commands and positions where the duties and responsibilities involve the integrated employment or support of the land, sea, and air forces of at least two of the three Military Departments. Such involvement includes, but is not limited to, matters relating to national military strategy, joint doctrine and policy, strategic planning, contingency planning, and command and control of combat operations under a unified command.

E2.1.16. Professional Specialties. Military occupational specialties (medical officer, dental officer, veterinary officer, medical service officer, nurse, biomedical science officer, chaplain, or judge advocate) for which joint duty requirements do not apply and may be waived for promotion to O-7.

E2.1.17. Program for Joint Education (PJE). A Chairman of the Joint Chiefs of



Staff-approved body of learning objectives, policies, procedures, and standards supporting joint professional military education requirements for JSO nomination. PJE is a shared responsibility of the Military Service colleges and National Defense University (NDU) for preparation of officers to serve in JDAs under Chairman of the Joint Chiefs of Staff Instruction 1800.01-96 (reference (e)).

E2.1.17.1. PJE Phase I. The first phase of PJE taught at intermediate and senior-level Service colleges and other educational programs which meet PJE criteria and are accredited by the Chairman of the Joint Chiefs of Staff.

E2.1.17.2. PJE Phase II. A second phase of PJE that enhances PJE Phase I instruction taught at AFSC and other NDU schools. PJE Phase I and II are required for JSO designation.

E2.1.18. Qualifying Reassignment. An authorized early release from a JDA that does not require a tour length waiver. Such an early release is requested by the Military Service and must have the concurrence of the losing joint activity. The reason for reassignment must be, as follows, for:

E2.1.18.1. Unusual personal reasons (including extreme hardship and medical conditions) beyond the control of the officer or the Military Department;

E2.1.18.2. An immediate reassignment to another JDA due to officer's promotion to a higher grade when no positions were available in the same organization in the officer's new grade; or,

E2.1.18.3. An immediate reassignment to another JDA due to elimination of the officer's position in a reorganization.

E2.1.19. Scientific and Technical Categories. Military occupational specialties for which GFO joint duty requirements do not exist.

E2.1.20. Temporary Duty (TDY). Temporary assignment of an officer to an organization that is not the organization to which an officer permanently belongs for manpower accounting purposes. TDY with other organizations does not alter the officer's permanent assignment status.

E2.1.21. Unusual or Extraordinary Positions. A category of positions that are not included in the OSD, the Chairman of the Joint Chiefs of Staff, Combatant Command positions, or organizational positions. Those positions may be included on the JDAL when the Secretary of Defense determines that the responsibilities of the

position provide the officer significant experience in joint matters that qualitatively are equivalent to experiences gained by other officers filling JDAs.

E2.1.22. Validation Board. A board convened as directed by the ASD(FMP) and composed of representatives from the OSD, the Chairman of the Joint Chiefs of Staff, and the Military Department to review positions for inclusion on the JDAL. The Board makes recommendations to ASD(FMP) through the Chairman of the Joint Chiefs of Staff on adding and/or deleting individual positions on the JDAL.

### E3. ENCLOSURE 3

#### JOINT DUTY ASSIGNMENTS (JDAs)

#### E3.1. JDAs and the JDAL

The JDAL is a list of JDAs approved by the ASD(FMP) with the advice and assistance of the DUSD(R&R) and of the Chairman of the Joint Chiefs of Staff. The JDAL is the position management file of JDAMIS and is managed by the Chairman of the Joint Chiefs of Staff.

E3.1.1. Positions that meet the definition of a JDA (enclosure 2, definition E2.1.7.) are included on the JDAL. Position redesignations, from JDA to non-JDA or vice versa, occur when the duties and responsibilities of the position change. A change in incumbents is not a basis for changing the position designation. The process used to add or delete JDAL positions is provided in sections E3.5. through E3.7. below.

E3.1.2. The following are excluded from the JDAL.

E3.1.2.1. Assignments for joint education and/or training.

E3.1.2.2. Assignments within an officer's own Military Department.

E3.1.2.3. Temporary or overage positions.

E3.1.2.4. Positions requiring grades O-3 and below.

E3.1.2.5. Positions requiring Reserve officers not on the active duty list.

E3.1.2.6. Positions requiring officers in the professional specialties: medical officers, dental officers, veterinary officers, medical service officers, nurses, biomedical sciences officers, chaplains, and judge advocates.

#### E3.2. Critical JDAs

Critical JDAs are JDA positions that require the incumbent to be previously trained, educated and experienced in joint matters, or at a minimum the position would be greatly enhanced by such an incumbent (enclosure 2). Critical JDAs must be filled by JSOs. The ASD(FMP), with the assistance of the DUSD(R&R) and of the Chairman

of the Joint Chiefs of Staff, designates “critical JDAs” in accordance with statute. The heads of joint activities shall identify those positions that meet the criteria of a critical JDA and recommend to the Chairman of the Joint Chiefs of Staff that they be designated as “critical JDAs.” Only positions requiring grades O-5 and above shall be designated as “critical JDAs.” Critical positions are not necessarily the most key and essential JDA positions within an activity, although that may be the case.

E3.2.1. If the number of critical JDAs identified by heads of joint activities is insufficient to ensure compliance with law, the Chairman of the Joint Chiefs of Staff shall direct the heads of joint activities to identify additional billets that meet the definition of a critical JDA to ensure compliance.

E3.2.2. Position redesignations occur when the duties and responsibilities of the position change and impact the requirement for an incumbent to be previously educated and experienced in joint matters. A change in incumbents is not a basis for changing the position designation. Stability in critical positions is essential to the Military Services’ production and maintenance of sufficient numbers of JSOs per career area. The process of developing a JSO takes several years.

### E3.3. Mission Essential JDAs

E3.3.1. Noncritical JDAs that are essential to mission accomplishment, may be designated as “mission essential” JDAs. The incumbents of positions designated as “mission essential” JDAs shall not be assigned to lengthy temporary duty assignments (e.g., 12 weeks or more) unless waived for such temporary assignments by the commander or director of the joint organization. For a position to be designated as “mission essential,” it must be one deep, key and essential, and have direct mission impact critical to the accomplishment of the joint organization's mission.

E3.3.2. No more than 15 percent of an activity's noncritical JDA positions may be recommended for “mission essential” status. The Chairman of the Joint Chiefs of Staff approves these requests.

### E3.4. JDA Fill Requirements

The Military Services shall ensure that approximately one-half of their O-4 and above JDA positions are filled with JSOs or JSO nominees at any time. The Military Services may not count more than 12.5 percent of their JDAs filled with “JSO nominees” designated under COS provisions (enclosure 7, section E7.5.) for this

purpose. The Military Services and joint activities shall ensure that critical JDAs are filled with JSOs unless waived by the Chairman of the Joint Chiefs of Staff.

#### E3.5. Critical JDA JSO Qualification Waiver

Requests to fill a critical JDA with a non-JSO shall be fully justified in accordance with the procedures that follow.

E3.5.1. The Military Service shall initiate the waiver request for individual officers who are nominated for assignment to a critical JDA. The joint organization shall initiate the request for officers being considered for an internal reassignment.

E3.5.1.1. Waiver requests for GFOs are forwarded to the Chairman of the Joint Chiefs of Staff Special Assistant for GFO Matters; all others are forwarded to the Chairman of the Joint Chiefs of Staff Directorate for Manpower and Personnel.

E3.5.1.2. Waiver requests shall have the concurrence of the Military Service and the joint activity and shall list all JSOs considered for that assignment.

E3.5.2. Non-JSOs shall not be assigned to critical JDAs without an approved waiver. Waiver requests must be forwarded to the Chairman of the Joint Chiefs of Staff 90 days before the desired reassignment date.

#### E3.6. JDAL Position Standards

Only positions where an officer gains significant experience in joint matters and where the position meets the definition of a JDA (enclosure 2, definition E2.1.7.) may be designated as JDA positions. Joint matters are matters relating to the integrated employment of land, sea, and air forces, including matters related to national military strategy, strategic planning and contingency planning, and command and control of combat operations under a combatant command. A position must meet both parts of the JDA definition, as follows, to be included on the JDAL. A position must be:

E3.6.1. In a multi-Service or multi-national command or activity which is involved in the integrated employment or support of land, sea, and air forces of at least two of the three Military Departments; and,

E3.6.2. Involved in matters relating to national military strategy, joint doctrine or policy, strategic planning, contingency planning, and command and control of combat

operations under a combatant command. Compliance with that requirement is determined by verifying that the preponderance of the officer's duties involve producing or promulgating national military strategy, joint doctrine, joint policy, strategic plans or contingency plans, or commanding and controlling operations under a combatant command.

### E3.7. JDAL Position Categories

Determining which positions may be included on the JDAL requires identification of positions that clearly meet the JDA definition (enclosure 2, definition E2.1.7.). There are five groups of qualifying positions.

E3.7.1. OSD Positions. The incumbents of those positions are responsible for developing and promulgating policies in support of national security objectives.

E3.7.2. Chairman of the Joint Chiefs of Staff Positions. The incumbents of those positions are responsible for matters relating to national military strategy, joint doctrine or policy, strategic planning, and contingency planning.

E3.7.3. Combatant Command Positions. The incumbents of those positions are involved in matters relating to national military strategy, joint doctrine or policy, strategic planning, contingency planning, and command and control of combat operations under a combatant command.

E3.7.4. Organizational Positions (Other Than Those in the OSD, the Chairman of the Joint Chiefs of Staff, or Combatant Command Positions). The incumbents of those positions are involved with the integrated employment or support of land, sea, and air forces, of at least two of the three Military Departments where the preponderance of the incumbent's duties directly deal with matters relating to national military strategy, joint doctrine or policy, strategic planning, contingency planning, or command and control of combat operations under a combatant command.

E3.7.5. Unusual or Extraordinary Positions. Those are positions where the Secretary of Defense determines the incumbent's responsibilities provide the officer significant experience in joint matters that qualitatively are equivalent to experiences gained by officers described in subsections E3.7.1. through E3.7.4. above. That provision is intended to accommodate the rare, unusual or extraordinary case that does not fit the basic template, but clearly provides the officer significant experience in joint matters that qualitatively are equivalent to experiences gained by other officers assigned to positions on the JDAL.

### E3.8. JDAL Review Process

The following process provides for the addition or deletion of JDAL positions:

E3.8.1. The organization where the position resides submits the following to the ASD(FMP) through the Chairman of the Joint Chiefs of Staff.

E3.8.1.1. The organization mission description and/or Charter.

E3.8.1.2. The organization wiring diagram.

E3.8.1.3. The individual position description.

E3.8.1.4. For existing positions, duty description extracts from performance reports of the incumbent or from the incumbent's predecessor if no performance report has been prepared on the incumbent.

E3.8.2. The above information is evaluated against the definitions and standards covered in section E3.6. above. A JDAL validation board, comprised of executive level representatives from the OSD, the Chairman of the Joint Chiefs of Staff, and the Military Services and convened as directed by the ASD(FMP), evaluates the information provided in consonance with the definitions and standards in section E3.6. above. The co-chairmen of the JDAL validation board forwards the board's determination to ASD(FMP) to recommend either addition or deletion of the position on the next iteration of the JDAL. The ASD(FMP), with the advice and assistance of the DUSD(R&R) and of the Chairman of the Joint Chiefs of Staff, approves JDAL additions and deletions.

E3.8.3. Positions other than the OSD, the Chairman of the Joint Chiefs of Staff, and Combatant Command positions, groups 4 and 5 (subsection E3.7.1.through E3.7.3. above), are reviewed by the JDAL Validation Board to be included on the JDAL. Positions in the OSD, the Chairman of the Joint Chiefs of Staff, and combatant command positions (subsection E3.7.1. through E3.7.3.), are included on the JDAL when the manpower requirement is approved. Those positions are reviewed to determine if they should remain on the JDAL when the position is identified as "possibly not meeting the definition of a JDA." OSD, the Chairman of the Joint Chiefs of Staff, or the Military Departments may submit a request to delete specific JDAL positions in those groups. All requests to add or delete JDAL positions are staffed, as described in subsection E3.8.1. and E3.8.2. above.

### E3.9. Updates and Changes to the JDAL

The following applies to changing positions on the JDAL.

E3.9.1. The ASD(FMP), with the advice and assistance of the DUSD(R&R) and the Chairman of the Joint Chiefs of Staff, approves JDAL position changes.

E3.9.2. Proposed changes to the JDAL shall be submitted through the Chairman of the Joint Chiefs of Staff.

E3.9.2.1. Proposed changes to the JDAL shall be coordinated by the Military Services and concerned organization representatives.

E3.9.2.2. Every attempt shall be made to move incumbents of positions deleted from the JDAL to qualifying reassignments.

E3.9.3. The JDAL shall be published as needed but at least semiannually. The JDAL used to complete the annual “Goldwater-Nichols Implementation Report to Congress” shall be published in the last quarter of the fiscal year (FY).

### E3.10. Acquisition Corps List

Officers filling JDAs designated as “Acquisition positions” and listed on the DoD Acquisition Position List are subject to the requirements of both this Instruction and DoD Directive 5000.52, DoD Instruction 5000.55, DoD Directive 5000.57, DoD Instruction 5000.58, and DoD 5000.52-M (references (f) through (j)).



## E4. ENCLOSURE 4

### JOINT DUTY CREDIT

#### E4.1. Joint Duty Credit

Officers must be assigned to positions on the JDAL to receive joint duty credit. Overstrength or temporary positions are not included on the JDAL. (See enclosures 12 and 13 for special provisions pertinent to Operations DESERT SHIELD/DESERT STORM and certain joint task force assignments.)

E4.1.1. An officer begins to accrue joint duty credit upon assignment to the JDAL position and stops accruing joint duty credit on departure from the JDAL position or on the date the position is removed from the JDAL, if before the officer's departure. Assignment to different JDAL positions within the same organization is one continuous tour of duty. The assignment dates recorded in JDAMIS are used to calculate the annual joint duty tour length average.

E4.1.2. The assignment of more than one officer to one JDA is not authorized except during reassignment. The overlap of incoming and outgoing officers, during which time both officers accrue joint duty credit, may not exceed 90 days.

E4.1.3. A GFO must serve a minimum of 2 years in a JDA to receive full joint credit, unless waived by the ASD(FMP). All others must serve a minimum of 3 years to receive full joint credit, unless waived by the ASD(FMP). All officers must serve at least 10 months in a JDA to receive cumulative joint credit except as provided in enclosure 13.

E4.1.3.1. COS officers (O-6 and below) who meet all the criteria contained in section E7.2. of enclosure 7, may receive full joint duty credit for serving at least 2 years in their initial JDA. In specific instances, up to 60 days of constructive credit may be used (see section E4.3. below).

E4.1.3.2. Officers (O-6 and below) who serve the accompanied-by-dependents tour prescribed by DoD Directive 1315.7 (reference (k)) in positions designated as full credit overseas JDAs, including Alaska and Hawaii, may receive full credit for serving less than 3 years in a JDA without a tour length waiver. Only those tours that are at least 2 years may be designated as full credit overseas JDAs. The number of JDAs that may be designated as full credit overseas tours shall not exceed 6

percent of the JDAL at any given time. The officer must serve the accompanied-by-dependents tour length regardless of marital or dependent status to receive full credit without a tour length waiver. Officers who serve the unaccompanied-by-dependents tour length or tours that are less than 2 years receive cumulative credit (discussed in section E4.2. below).

#### E4.2. Cumulative JDA Credit

Officers who serve at least 10 months in a JDA may receive cumulative JDA credit when the criteria in subsections E4.2.1. and E4.2.2., below, are met. Cumulative credit may be combined to receive full joint duty credit when the minimum JDA tour length (2 or 3 years) is met.

E4.2.1. At least one of the JDAs used to accumulate joint credit must be an overseas assignment (which includes Hawaii and Alaska) or a qualifying reassignment and the officer must serve at least 10 months in the assignment. There are three types of qualifying reassignments, as follows:

E4.2.1.1. Reassigned for Unusual Personal Reasons. Reassignment for reasons not under the officer's or Military Service's control. That includes extreme hardship and medical conditions.

E4.2.1.2. Officer Promoted. Officer promoted and no other billets requiring the officer's grade or skill are available in the same organization. To accumulate the time accrued, the officer must be immediately reassigned to another JDA.

E4.2.1.3. Position Eliminated. Officer's position is eliminated due to reorganization. To accumulate the time accrued, the officer must be immediately reassigned to another JDA.

E4.2.2. JDA credit from JDAs not covered by subsection E4.2.1., above, may be accumulated with cumulative joint credit from overseas and/or qualifying reassignment JDAs (subsection E4.2.1., above) provided the officer serves a minimum of 2 years in the JDA with the following exception. For officers whose reassignment is due to the officer being promoted out of the JDA or due to the officer's JDA position being eliminated as provided in subsection E4.2.1.2. and E4.2.1.3., above, the time served in the assignment that follows may be accumulated provided the officer serves a minimum of 10 months in the JDA. Constructive credit may be applied as discussed in section E4.3., below.

E4.2.3. Cumulative credit may also be awarded for certain joint task force (JTF) headquarters assignments. Details are in enclosure 13.

#### E4.3. Constructive Credit for Joint Duty Tour Completion

(Does not apply to GFOs.) Officers may depart a JDA up to 60 days early and receive constructive credit when the criteria in subsection E4.3.1. and E4.3.2., below, are met. Constructive credit may be applied to 3-year JDA tour lengths, to 2-year early COS reassignments (enclosure 7), to overseas assignments with 2 year or more tour lengths (includes Hawaii and Alaska) and to JDA tours when 2 years of cumulative credit is accrued according to subsection E4.2., above. Constructive credit is excluded when calculating the joint duty tour length average; only time actually served in a JDA may be used to calculate the joint tour length average (enclosure 11).

E4.3.1. Early departure is required for military necessity; e.g., school report date or a change of command that cannot be delayed. Constructive credit may only be used when other alternatives would not suffice in meeting mission requirements and is not used for personal convenience.

E4.3.2. Officer must have served at least 10 months in the JDA (e.g., 10 months actually served plus 60 days constructive credit would give the officer 12 months of cumulative JDA credit).

#### E4.4. Joint Duty Credit When JDAL Positions Are Added or Removed

Positions that meet the definition of a JDA are added to the JDAL and are removed from the JDAL when the responsibilities of the position change. A position is removed from the JDAL when it no longer meets the definition of a JDA or the position is eliminated. An officer's joint duty credit begins on assignment to a JDAL position. The officer cannot accrue joint duty credit prior to the JDAL position start date or after the JDAL position stop date maintained in JDAMIS. JDAL start dates for new positions cannot be dated before the incumbent's date of assignment to that position.

#### E4.5. Joint Duty Credit for Officers in Grade O-3

Officers in the grade of O-3 assigned to JDAs receive joint duty credit; all joint duty

provisions apply, including tour length and early release requirements.

E4.6. Joint Duty Credit During Periods of Temporary Duty

Temporary duty does not change an officer's permanent assignment to a JDA position or joint duty credit status.

## E5. ENCLOSURE 5

### TOUR LENGTH REQUIREMENTS AND EARLY RELEASES

#### E5.1. Tour Length Requirements

Except for JDAs terminated by joint duty tour length waivers or for one of the reasons listed in section E5.3., below, officers assigned to JDAs in grades O-6 and below must complete at least 3 years in those JDAs and GFOs must complete at least 2 years. (Consecutive JDAs, without a break, in the same joint activity, as listed on the JDAL, are considered to be a single tour of duty.)

#### E5.2. Annual Joint Duty Tour Length Average

For each Military Service, the average tour length for all JDAs (measured by the lengths of the JDAs that ended during each FY) must be not less than 3 years for officers in grades O-6 and below and not less than 2 years for GFOs. JDA tours terminated by joint duty tour length waivers are included in the annual tour length average. Reassignment from JDAs under section E5.3., below, may be excluded from the annual tour length average. Annual tour length averages are reported to Congress for each Military Service according to the following categories:

E5.2.1. GFOs assigned to JDAs under the Chairman of the Joint Chiefs of Staff.

E5.2.2. GFOs assigned to all other JDAs (excluding Chairman of the Joint Chiefs of Staff JDAs).

E5.2.3. O-6s and below assigned to JDAs under the Chairman of the Joint Chiefs of Staff.

E5.2.4. O-6s and below assigned to all other JDAs (excluding Chairman of the Joint Chiefs of Staff JDAs).

#### E5.3. Early Release from JDA

The Military Services initiate requests to release officers early from a JDA. All early releases must provide full justification and have the concurrence of the officer's joint organization. Concurrence from the joint organization must be obtained from a GFO,

or civilian equivalent, in the officer's chain of command. In cases where the joint activity does not concur with the release, resolution of the disagreement shall be addressed to the Chairman of the Joint Chiefs of Staff or the ASD(FMP), as appropriate. Officers may be released from JDAs before completing the prescribed tour lengths without a JDA tour length waiver, as follows:

E5.3.1. COS officers who meet all the criteria in enclosure 7, section E7.2.

E5.3.2. Officers released from a second JDA that is not less than 2 years as authorized by statute. The number of JDAs terminated under this paragraph is limited to 10 percent of the total number of JDAs. At the beginning of each FY, the Chairman of the Joint Chiefs of Staff shall determine the number each Military Service is authorized to release so as to not exceed the 10 percent limit.

E5.3.3. Officers serving in overseas JDAs, including Alaska and Hawaii, for which the tour length prescribed by DoD Directive 1315.7 (reference (k)) is less than 3 years (O-6 and below) or 2 years (GFOs). Officers who serve the unaccompanied-by-dependents tour length or tours that are less than 2 years receive cumulative credit.

E5.3.4. Reassignment is from a JDA that:

E5.3.4.1. Meets the definition of a qualifying reassignment (enclosure 4, subsection E4.2.1.); or,

E5.3.4.2. Is accumulated for full joint tour credit and the officer has served at least 2 years in that JDA; or,

E5.3.4.3. Is the first assignment that followed a previous early release from a JDA due to the officer being promoted and no other JDA positions were available in the same organization or the officer's position being eliminated due to organization (enclosure 4, paragraphs E4.2.1.2. and E4.2.1.3.) and the JDA is accumulated for full joint tour credit. At least 10 months must have been served to accumulate the tour for full joint tour credit.

E5.3.5. Officer retires or is released from active duty.

E5.3.6. Officer is suspended from duty and reassigned from the Chairman of the Joint Chiefs of Staff or a Combatant Command under title 10 U.S.C. 155(f)(2) or 164(g) (reference (b)). A suspension from duty is normally an adverse action that should be documented in the officer's personnel record, and in writing, to the

appropriate Military Service.

#### E5.4. Joint Duty Tour Length Waivers

Except for the reasons contained in section E5.3., above, early releases from all JDAs, including overseas tours that are not covered above, require a joint duty tour length waiver. Tour length waiver requests are considered on a case-by-case basis with the departing officer receiving full, cumulative, or no joint duty credit. Tour length waivers must be approved before an officer departs the joint organization.

E5.4.1. Waiver requests for early release from a JDA are initiated by the Military Services and forwarded from the Military Departments through the Chairman of the Joint Chiefs of Staff to the ASD(FMP) for action. Waiver requests shall be submitted to the Chairman of the Joint Chiefs of Staff at least 45 days before the desired departure date. GFOs may only be awarded full GFO joint duty credit after serving at least 14 months in a JDA. O-6s and below may only be awarded full credit after serving at least 22 months in a JDA.

E5.4.2. Although the Secretary of Defense is the approval authority, the Secretaries of the Military Departments may exercise disapproval authority or delegate disapproval authority.

E5.4.3. JDA tour length waiver requests should specifically address the areas listed in paragraphs E5.4.3.1. through E5.4.3.12., below, and substantiate why the officer should be released at the requested time. (Requests stating that an officer is "the best or only" qualified officer must also contain sufficient supporting information.) An officer career brief shall be attached to the waiver request.

E5.4.3.1. Officer's grade, name, social security number, current JDA position line number and description, and specify if the officer is serving in a critical JDA.

E5.4.3.2. Assignment history including PJE and previous JDA dates, and specify when the officer was designated a "JSO" if applicable.

E5.4.3.3. The name, grade and duty title of the GFO, or civilian equivalent, providing the concurrence or nonconcurrence of the losing activity. Also indicate if a replacement has been nominated and accepted to fill the vacancy should the waiver be approved. If a replacement has been identified, provide the officer's name and indicate if the officer is a JSO or a JSO nominee with or without PJE.

E5.4.3.4. Duty title of the officer's projected assignment, and indicate if that is a JDA reassignment.

E5.4.3.5. Projected promotion date (if applicable).

E5.4.3.6. Specific qualifications making the officer uniquely qualified for the proposed assignment.

E5.4.3.7. Impact on the officer and the gaining organization if the waiver is not approved.

E5.4.3.8. Availability of other qualified officers.

E5.4.3.9. Recommended departure date.

E5.4.3.10. Recommendation and justification for full, cumulative, or no JDA credit, and the number of months the officer will have served in that JDA on reassignment.

E5.4.3.11. Specify current Military Service JDA tour length average, and potential effect on tour length average if the waiver is approved.

E5.4.3.12. Explanation for late requests (if applicable).



## E6. ENCLOSURE 6

### JOINT SPECIALTY OFFICERS (JSOs) AND JSO NOMINEES

#### E6.1. Joint Specialty Officers

The designation as a “JSO” or a “JSO nominee” is an administrative classification that identifies an officer as having education and/or experience in joint matters and is in addition to the officer's primary military occupational specialty. The designations of “JSO” or “JSO nominee” are officer management tools used primarily in the assignment selection process and may not be declined by the officer. There are no restrictions on the number of JSOs; however, sufficient numbers must be available to meet the JDA and critical JDA fill requirements outlined in enclosure 3.

#### E6.2. JSO Selection Criteria

Officers must first complete an approved PJE and subsequently receive credit for a full JDA to qualify for designation as a “JSO,” except as noted in subsection E6.2.1. and E6.2.2.1. and E6.2.2.2., below.

E6.2.1. Officers in grades O-6 and below with a COS are exempt from the normal sequencing requirement of PJE followed by a JDA and may qualify for “JSO” designation after a 2-year initial JDA followed by completion of PJE.

E6.2.2. The Secretary of Defense may, on a case-by-case basis in the interest of sound personnel management (e.g., a mission essential assignment), waive the sequence requirement (PJE then JDA) or waive the PJE requirements if the officer has completed two full JDAs. Waivers for officers who have completed two full JDAs are only permitted when it is impractical to require the officer to complete PJE at the current stage of the officer's career and the types of JDAs the officer completed were of sufficient breadth to prepare the officer adequately for the joint specialty. To request those waivers for a GFO, the Military Service must also show that the waiver is necessary to meet a critical need, as determined by the Chairman of the Joint Chiefs of Staff.

E6.2.2.1. For O-6s and below, the total number of sequence and two JDA waivers combined must not exceed 10 percent of the total “JSO” designations by grade for any FY. The officers' rank as of the “JSO” Designation Board convening date shall be used to determine the maximum number of waivers available. Each Military

Service shall not exceed this 10 percent limit without the approval of the ASD(FMP). When the OSD has waivers available at the close of the FY, the Chairman of the Joint Chiefs of Staff shall distribute, with ASD(FMP) approval, the waivers to officers whose "JSO" designation has been approved, but deferred, by the Secretary of Defense contingent on the availability of the requisite waiver. When allocating the available waivers, consideration shall be given to those officers whose "JSO" designation would fill the most critical need.

E6.2.2.2. For GFOs, the total number of sequence and two JDA waivers combined must not exceed a number that would result in more than 32 GFOs being on active duty at the same time who were designated as JSOs when holding a GFO grade and for whom a sequence or two JDA waiver was granted under this paragraph. A Military Department may request authority to use this waiver with requests to designate selected "GFOs" as "JSOs" to the Secretary of Defense through the Chairman of the Joint Chiefs of Staff.

### E6.3. "JSO" Designation Process

"JSO" Designation Boards are used to recommend O-6s, and below, for "JSO" designation. "JSO" Designation Boards may be used to recommend GFOs for "JSO" designation, if desired. Boards are convened by the Secretaries of the Military Departments. The Secretaries of the Military Departments forward their recommendations, through the Chairman of the Joint Chiefs of Staff, to the Secretary of Defense for approval.

E6.3.1. Each board shall include at least one officer designated by the Chairman of the Joint Chiefs of Staff who is currently serving in a JDA. Not later than 45 days before the board convening date, the Military Services shall provide the Chairman of the Joint Chiefs of Staff with a list of two available officers eligible for such board duty, and the Chairman of the Joint Chiefs of Staff may select an officer from that list or any other qualified officer to serve on the board.

E6.3.2. The Secretaries of the Military Departments must provide written instructions for "JSO" Designation Boards that include the following guidance:

E6.3.2.1. The board is responsible for ensuring the officers recommended for "JSO" designation meet the highest standards of performance, education, and experience.

E6.3.2.2. Officers recommended for "JSO" designation are expected to have

performance records of at least the same overall quality as officers selected for assignment to the Military Service headquarters staffs.

E6.3.2.3. An assessment of the numbers of critical JDA billets assigned to the Military Service and the adequacy of the JSO inventory available to support those requirements by grade and skill.

E6.3.3. Military Department recommendations for “JSO” designation shall be forwarded through the Chairman of the Joint Chiefs of Staff to the Secretary of Defense for approval. JSO recommendations must include PJE schools attended and date graduated; the officer’s COS, if applicable; qualifying JDA; and, when applicable, the Service Secretary’s determination that a sequence or two full JDA waiver is necessary in the interest of sound personnel management. If a two full JDA waiver is requested, the Service Secretary must also indicate why it is impractical for the officer to complete JPME at this stage of the officer’s career. That recommendation must be accompanied by a computer file disk that shall be used to update JDAMIS. That disk must include the social security number, the first four characters of the officer's last name, and the basis for selection code.

#### E6.4. Revocation of "JSO" Designation

E6.4.1. Secretaries of the Military Departments may initiate revocation of the “JSO” designation when the officer no longer meets standards under which the JSO designation was granted. Nonselection for promotion is not normally sufficient justification for recommending the officer’s “JSO” designation be revoked.

E6.4.2. The Secretary of the Military Department concerned must notify the officer in writing of the reason(s) for the recommendation to revoke the officer’s “JSO” designation. The officer must be provided a reasonable opportunity to submit comments to the officials making the recommendation. All documentation shall be submitted with the recommendation.

E6.4.3. The Secretaries of the Military Departments forward their recommendation for revocation through the Chairman of the Joint Chiefs of Staff to the Secretary of Defense for approval.

E6.4.4. The Secretary of Defense may revoke the “JSO” designation for any officer. Such action is considered on a case-by-case basis, when the officer no longer meets standards under which the “JSO” designation was granted. An officer whose “JSO” designation has been revoked shall not be assigned to a JDA position except in

time of war, national emergency declared by the Congress or the President, or with the specific approval of the Secretary of Defense.

#### E6.5. JSO Nominee

The Secretaries of the Military Departments select officers as JSO nominees to ensure that JDAL fill requirements are met.

E6.5.1. Officers in grades O-3, and above, assigned to a JDA or who have completed a full tour of duty in a JDA, are selected as JSO nominees when they meet the following criteria unless the Secretary of the Military Department notifies the Chairman of the Joint Chiefs of Staff that the officer is not of sufficient quality to warrant nomination. The Chairman of the Joint Chiefs of Staff shall update JDAMIS to classify those officers as “JSO nominees” unless notified otherwise by the Military Department.

E6.5.1.1. Completed PJE, as outlined in enclosure 10; or,

E6.5.1.2. Possess a COS.

E6.5.2. Selection of an officer as a JSO nominee identifies the officer as a candidate for “JSO” designation but does not constitute a recommendation for “JSO” designation.

#### E6.6. JSO Career Guidelines

JSOs are not expected to serve entirely in the joint arena. JSOs are expected to maintain a high level of knowledge of joint matters and be qualified in their Military Service specialty. The Secretary of Defense, with the advice of the Chairman of the Joint Chiefs of Staff, oversees the careers of JSOs and officers who are serving or have served in JDAs.

E6.6.1. The Chairman of the Joint Chiefs of Staff, with the assistance of the Military Services, establishes JSO career development guidelines to ensure that sufficient numbers of quality officers especially educated and experienced in joint matters are maintained.

E6.6.2. The Chairman of the Joint Chiefs of Staff monitors the promotions of JSOs and other officers who are serving or have served in JDAs.

E6.6.3. The Chairman of the Joint Chiefs of Staff manages JDAMIS and the Military Services update JDAMIS data files to aid monitoring of JSOs and other officers who are serving or have served in JDAs.

## E7. ENCLOSURE 7

### CRITICAL OCCUPATIONAL SPECIALTIES (COS)

#### E7.1. Critical Occupational Specialties

(Does not apply to GFOs.) The ASD(FMP) may designate those military occupational specialties as “COS” if the skill is in the combat arms for the Army, and equivalent career areas for the other Military Services, and a severe shortage of trained officers in that skill exists.

#### E7.2. Early Release Criteria

Officers possessing a COS may be released early from a JDA with the approval of the joint activity if they meet all of the criteria in subsection E7.2.1. and E7.2.2., below.

E7.2.1. Must be serving in their initial JDA and must serve at least 2 years in that JDA. If eligible per enclosure 4, section E4.3., up to 60 days of constructive credit may be applied toward this assignment. If maximum constructive credit is authorized, the officer may be released early after completion of 22 months in the assignment.

E7.2.2. Designated as a “JSO nominee.” (Officers with a COS who were designated as “JSOs” under the transition rules before October 1, 1989, based solely on completion of PJE, may be released early from a JDA.)

#### E7.3. Exclusion From Tour Length Averaging

JDA's terminated under section E7.2., above, may be excluded from the annual tour length average subject to a maximum ceiling of 12.5 percent of the total number of JDA's. At the beginning of each FY, the Chairman of the Joint Chiefs of Staff shall determine the number of exclusions each Military Service is authorized so as to not exceed the 12.5 percent limit.

#### E7.4. JSO Provision

The sequence requirement to complete PJE and then a JDA does not apply to COS officers for “JSO” designation.

#### E7.5. Fill of Critical JDAs by COS JSOs

Of the officers selected for “JSO” designation based on the COS provisions in section E7.2., above, Military Services shall ensure that an appropriate portion is subsequently assigned to critical JDAs. An appropriate portion should be approximately equal to the portion of “JSOs” designated from COS officers who completed joint duty assignments under the early release provision in section E7.2., above, for each Military Service compared to the total number of “JSOs” designated for each Military Service. This ensures that a reasonable number of “2-year” COS officers return for a second joint tour. For example, if a Military Service has a total of 3,500 JSOs, and 500 (or approximately 14 percent) are “2-year” COS JSOs, then approximately 14 percent of the Military Service’s critical JDA positions should be filled with “2-year” COS JSOs.

#### E7.6. Limitation on COS JSO Nominees Fill of JDAs

The Military Services shall ensure that approximately one-half of their O-4 and above JDA positions are filled with JSOs or JSO nominees at any time. The Military Services may not count more than 12.5 percent of their JDAs filled with “JSO nominees” designated under COS provisions, section E7.5. above, for this purpose.

#### E7.7. Designations

Skills that may be designated as “COS” are determined each FY and are included in the “Goldwater-Nichols Act Implementation Report Annex to the Secretary of Defense Annual Report to the President and the Congress.” As required, the Military Services submit requests to update the list of COS skills through the Chairman of the Joint Chiefs of Staff to the Secretary of Defense for approval.

## E8. ENCLOSURE 8

### GENERAL AND FLAG OFFICER PROVISIONS

#### E8.1. Full Tour of Joint Duty

The joint duty tour length requirement for general and flag officers (GFOs) is at least 2 years unless the ASD(FMP) approves a tour length waiver (see subsection E5.4.1. of enclosure 5) or the incumbent departs due to reasons provided in section E5.3. of enclosure 5.

#### E8.2. GFO JDA Credit

Joint duty credit begins to accumulate the day an officer is assigned to a JDA position. The officer's pay grade on departure from a JDA determines the type of JDA credit the officer receives (GFO or field grade credit). Officers who are O-7 selects (includes frocked O-7s) on departure from a JDA may only receive field grade JDA credit. Enclosures 12 and 13, award of joint duty credit for assignments during DESERT SHIELD and DESERT STORM and qualifying temporary JTF assignments, apply to GFOs.

#### E8.3. JDA Promotion Prerequisite

An officer on the active duty list may not be appointed to the grade of O-7 unless the officer has completed a full tour of duty in a JDA. The ASD(FMP) may waive that JDA requirement on a case-by-case basis for the following reasons:

E8.3.1. Good of the Service. When this waiver is granted, the first duty assignment as a GFO must be to a JDA. Until January 1, 1999, the Secretary of Defense may waive that requirement. An officer receiving such a waiver may not be appointed to O-9 until completion of a GFO JDA. After January 1, 1999, the "Good of the Service" waiver shall be on the condition that the first assignment as a GFO must be a JDA.

E8.3.2. Scientific and Technical. For an officer whose selection is based primarily on scientific and/or technical qualifications for which JDA positions do not exist. Officers receiving scientific and technical waivers must serve continuously in the specialized field or serve in a JDA before reassignment to a nonscientific and



technical position. Those categories are as follows:

E8.3.2.1. Scientific.

E8.3.2.1.1. Chemical.

E8.3.2.1.2. Oceanography.

E8.3.2.1.3. Weather.

E8.3.2.1.4. Engineer.

E8.3.2.1.4.1. Civil Engineer Corps.

E8.3.2.1.4.2. Engineering Duty Officer.

E8.3.2.1.4.3. Aeronautical Engineering Duty Officer.

E8.3.2.1.4.4. Scientific & Development Engineer.

E8.3.2.2. Technical.

E8.3.2.2.1. Acquisition Professional Career Fields.

E8.3.2.2.2. Aviation Maintenance.

E8.3.2.2.3. Comptroller/Finance.

E8.3.2.2.4. Education & Training.

E8.3.2.2.5. Law Enforcement/Military Police.

E8.3.2.2.6. Missile Maintenance.

E8.3.2.2.7. Ordnance.

E8.3.2.2.8. Public Affairs.

E8.3.2.2.9. Research & Development Program Management.

E8.3.2.2.10. Services.

E8.3.3. Professional. For an officer whose military occupational specialties are

medical officer, dental officer, veterinary officer, medical service officer, nurse, biomedical science officer, chaplain, or judge advocate officer.

E8.3.4. Serving In. For an officer who is serving in a JDA for not less than 2 years during which time the officer is selected for promotion to the grade of O-7. The officer must have completed at least 180 days in the JDA on the date the board convened.

E8.3.5. JDA before January 1, 1987. For an officer who served in a JDA for at least 12 months that began before January 1, 1987.

E8.3.6. Joint Equivalent. Until January 1, 1999, for an officer who served at least 12 months in a non-JDA starting before October 1, 1986, that involved significant experience in joint matters. Officers with a date of rank to O-7 after January 1, 1994 and promoted to O-7 under this subsection must complete a JDA before appointment to O-9. Of the total number of officers promoted to O-7 in each Military Service, the number promoted using that waiver in each Military Service is limited to 15 percent for 1996, 10 percent for 1997, and 5 percent for 1998.

#### E8.4. JSO Selection Criteria and Procedures

The JSO selection criteria and procedures for GFOs is the same as for field grade officers except that a normal full tour of joint duty is 2 years and a "JSO" Designation Board is not required (enclosure 6).

#### E8.5. COS Provisions

COS provisions do not apply to GFOs.

#### E8.6. Attendance at CAPSTONE

Officers selected for promotion to O-7, must attend the CAPSTONE course (a course at NDU designed to prepare O-7s to work in the joint environment) within approximately 2 years after confirmation of selection unless such attendance is waived. Officers may attend CAPSTONE as soon as their selection has been publicly announced. The Secretary of the Military Departments may request that the ASD(FMP), through the Chairman of the Joint Chiefs of Staff, waive CAPSTONE attendance for the following reasons:

E8.6.1. If the officer's assignment before selection to the grade O-7 was a JDA and the officer is thoroughly familiar with joint matters.

E8.6.2. When necessary for the good of the Military Service.

E8.6.3. In the case of an officer whose selection for promotion is based on scientific and technical qualifications for which JDA positions do not exist.

E8.6.4. In the case of a medical officer, dental officer, veterinary officer, medical service officer, nurse, biomedical science officer, or chaplain.

#### E8.7. Positions with Special JDA and JSO Requirements

E8.7.1. To be assigned as Chief of a Military Service, the officer must have previously completed a full tour of duty in a JDA as a GFO.

E8.7.2. To be selected as the Vice Chairman of the Joint Chiefs of Staff, or as a Combatant Command Commander in Chief, the officer must have previously completed a full tour of duty in a JDA as a GFO and be a JSO.

E8.7.3. To be selected as the Chairman of the Joint Chiefs of Staff, the officer must have served as Vice Chairman of the Joint Chiefs of Staff, Chief of a Military Service, or a Combatant Command Commander in Chief.

E8.7.4. The President may waive any of the requirements in subsections E8.7.1 through E8.7.3, above, if such action is in the national interest.

#### E8.8. Evaluation of Senior Officers

The Chairman of the Joint Chiefs of Staff must review the joint duty experience of each officer recommended for initial appointment to grade O-9 and O-10 and provide an evaluation of that officer's performance in JDAs through the Secretary of Defense to the President.

#### E8.9. GFO Promotion Objectives

Promotion objectives in enclosure 9 apply to GFOs.



## E9. ENCLOSURE 9

### PROMOTION REQUIREMENTS

#### E9.1. Promotion Objectives

The qualifications of officers assigned to JDAs and officers designated as “JSOs” should be such that:

E9.1.1. Officers who are serving, or have served, on the Joint Staff are expected, as a group, to be promoted to the next higher grade at a rate not less than the rate for officers in the same Military Service in the same grade and competitive category who are serving, or who have served, on the headquarters staff of their Military Service.

E9.1.2. JSOs are expected, as a group, to be promoted at a rate not less than the rate for officers in the same Military Service in the same grade and competitive category who are serving, or have served, on the headquarters staff of their Military Service.

E9.1.3. Officers who are serving, or have served, in JDAs (excluding officers in subsections E9.1.1. and E9.1.2., above) are expected, as a group, to be promoted to the next higher grade at a rate not less than the rate for all officers in the same Military Service in the same grade and competitive category.

E9.1.4. Officers who are serving, or have served, on the staff of the Secretary of Defense are expected to be promoted to the next higher grade, as a group, at a rate not less than that for officers in the same grade and competitive category who are serving, or have served, on the headquarters staff of their Military Service.

#### E9.2. Promotion Tracking

The tracking and reporting of promotion statistics shall be in consonance with CJCSI 1330.02 for O-6s and below and CJCSI 1331.01 for GFOs (references (c) and (l)).

#### E9.3. Promotion Board Requirements

Active duty list promotion selection boards, including special selection boards, considering JSOs or officers who are serving, or have served, in JDAs must include at

least one officer designated by the Chairman of the Joint Chiefs of Staff as a “board member who is currently serving in a JDA.”

E9.3.1. The Military Departments concerned shall recommend a minimum of two available officers for such duty to the Chairman of the Joint Chiefs of Staff, who shall select an officer from that list or another qualified officer.

E9.3.2. The Secretary of the Military Department's formal charge, letter of instruction, or precept for promotion selection boards shall include, at a minimum, guidelines to ensure that the board gives appropriate consideration to the performance in joint duty assignments of officers who are serving in, or have served in, such assignments as required by DoD Directive 1320.12 (reference (m)). Additionally, the records of all officers who are serving, or have served, in a JDA or who have been designated as a “JSO” shall be clearly identified for board members.

E9.3.3. For promotion selection boards, including special selection boards, that consider officers on the active duty list who are serving, or have served, in JDAs, the Chairman of the Joint Chiefs of Staff shall review the promotion board results to determine if joint duty performance was given appropriate consideration according to DoD Directive 1320.12 (reference (m)).

## E10. ENCLOSURE 10

### PROFESSIONAL MILITARY EDUCATION

#### E10.1. Educational Framework of Professional Military Education (PME)

PME is the systematic instruction of professionals in subjects that enhance their knowledge of the science and art of war. Joint PME (JPME) is that portion of PME concentrating on instruction of joint matters. Program for Joint Education (PJE) is a Chairman of the Joint Chiefs of Staff-approved body of objectives, policies, procedures, and standards supporting JPME requirements for JSO nomination. PJE is a shared responsibility of the Military Service colleges and NDU. National War College (NWC) and Industrial College of the Armed Forces (ICAF) curricula encompass the entire PJE (Phase I and Phase II). Other educational institutions approved by the Chairman of the Joint Chiefs of Staff conduct PJE Phase I, and Armed Forces Staff College (AFSC) conduct PJE Phase II. Officers who complete both PJE Phase I and PJE Phase II satisfy the educational requirements for JSO nomination.

E10.1.1. PJE Phase I. PJE Phase I is that portion of the PJE that is incorporated into the curricula of intermediate and senior-level Military Service PME schools and other appropriate educational programs that meet PJE criteria and are accredited by the Chairman of the Joint Chiefs of Staff.

E10.1.2. PJE Phase II. PJE Phase II is that portion of PJE that complements PJE Phase I. PJE Phase II is taught at AFSC to both intermediate and senior-level students. Officers must complete PJE Phase I to be eligible to attend PJE Phase II. Under exceptional conditions, the Chairman of the Joint Chiefs of Staff may approve a “direct-entry” waiver to permit an officer to complete PJE II without having completed PJE Phase I. PJE Phase II is integrated, along with PJE Phase I, into the curricula of NWC and ICAF.

E10.1.3. Other programs, as approved by the Chairman of the Joint Chiefs of Staff, may satisfy the Phase I requirement.

#### E10.2. Officer Professional Military Education Policy (OPMEP)

The OPMEP, under CJCSI 1800.01-96 (reference (e)), defines the objectives and policies of the Chairman of the Joint Chiefs of Staff about the schools, colleges, and other educational institutions that make up the military education system of the Armed

Forces. Additionally, it identifies the fundamental responsibilities of the major participants in the military education arena in achieving desired educational goals. In terms of PJE, the OPMEP provides the policy guidance necessary to meet DoD responsibilities for the development of JSOs.

### E10.3. PJE Phase II Graduates

The Military Services must ensure that the following requirements are met by officers who graduate from each of the NDU schools (e.g., the NWC, the ICAF, or the AFSC) for each FY:

E10.3.1. All JSOs must be assigned to a JDA as their next duty assignment following graduation unless waived on a case-by-case basis by the ASD(FMP).

E10.3.2. More than 50 percent (defined as “50 percent plus one”) of all non-JSO graduates (for each Military Service) from each of those schools must be assigned to a JDA as their next duty assignment following graduation. One half of the officers subject to that requirement (for each Military Service for each school) may be assigned to a JDA as their second (rather than first) assignment following graduation, if necessary for efficient officer management. The Military Service shall coordinate with the Chairman of the Joint Chiefs of Staff to document compliance in JDAMIS.



E11. ENCLOSURE 11  
REPORT REQUIREMENTS

E11.1. Annual Joint Officer Management Report to Congress

Not later than November 15 of each year, the Chairman of the Joint Chiefs of Staff shall, with the assistance of the Military Services and using the JDA Management Information System, prepare for Secretary of Defense approval, the “Goldwater-Nichols Act Implementation Report Annex to the Secretary of Defense Annual Report to the President and the Congress.” The report includes the following information, which is shown for the Department of Defense as a whole and separately for the Military Services, as follows:

E11.1.1. The number of officers nominated and selected for award of the joint specialty and their education and experience.

E11.1.2. The military occupational specialties within each of the Armed Forces that have been designated as COS, in accordance with requirements, in enclosure 7.

E11.1.3. The number of officers on the active duty list with a “COS,” as follows, who have:

E11.1.3.1. Been nominated for the joint specialty.

E11.1.3.2. Been nominated for the joint specialty and are serving in a JDA.

E11.1.3.3. Completed a JDA and are attending an appropriate program at a JPME school.

E11.1.3.4. Completed an appropriate program at a JPME school.

E11.1.3.5. Been selected for the joint specialty.

E11.1.3.6. Served or are serving in a second JDA after being selected for the joint specialty, with the number of such officers who have served or are serving in a critical JDA shown separately for GFOs and for all other officers.

E11.1.4. The number of officers nominated for the joint specialty and, of those nominated, the number who have a “COS”; a comparison of the number of COS

officers who have the joint specialty with the number of other officers who have the joint specialty.

E11.1.5. An analysis of assignments of officers after selection for the joint specialty.

E11.1.6. A summary for each Military Service's success in meeting the promotion rate objectives under Chairman of the Joint Chiefs of Staff Instructions 1330.02 and 1331.01 (references (c) and (l)). Rates are reported separately for officers possessing the joint specialty, officers who are serving on the Joint Staff, other officers serving in JDAs, and officers who are serving on their Military Service headquarters staff, as well as for officers who "have served" in each of the categories. Separate statistics are provided by grade and competitive category for in, above, and below the zone consideration for all promotion selection board results approved during the fiscal year.

E11.1.7. The average length of tours of duty in JDAs is shown separately for GFOs and other officers and for assignments to the Joint Staff and other JDAs.

E11.1.8. In each category of exclusion, the number of times that service in a JDA was excluded in computing the average length of JDAs.

E11.1.9. An analysis of the extent to which the Secretary of each Military Department is providing officers to fill that Military Department's share (as determined by law or by the Secretary of Defense) of Joint Staff and other JDAs, including the reason for any significant failure by a Military Department to fill its share of such positions and a discussion of the actions taken to correct the shortfall.

E11.1.10. The number of times a waiver authority was exercised under any law that permits the waiver of such requirement for JDAs and in the following case of each such authority:

E11.1.10.1. Whether the authority was exercised for a GFO.

E11.1.10.2. An analysis of the reasons for exercising the authority.

E11.1.10.3. The number of times in which action was taken without exercise of the waiver authority compared with the number of times waiver authority was exercised.

E11.1.11. For the 5-year period beginning with FY 1994, the degree of progress made toward meeting the requirement of 10 U.S.C. 619a (reference (b)) on

qualification of officers for promotion to O-7.

E11.1.12. The number of officers granted credit for service in JDAs in enclosure 13. The number of officers granted full and cumulative joint duty credit. A description of each operation for which an officer was granted joint duty credit.

E11.1.13. Other information, as required.

E11.2. Additional Reports

With the advice and assistance of the Chairman of the Joint Chiefs of Staff, the Office of the Secretary of Defense shall submit additional reports, as required by Congress.

## E12. ENCLOSURE 12

### JOINT DUTY CREDIT FOR OPERATIONS DESERT SHIELD/DESERT STORM

#### E12.1. General

E12.1.1. Section 933 of the FY 1993 National Defense Authorization Act, codified at 10 U.S.C. Section 664(f) (reference (b)) authorized the Secretary of Defense, in consultation with the Chairman of the Joint Chiefs of Staff, to grant joint duty credit for certain duty performed in the Persian Gulf combat zone that provided significant experience in joint matters. That authority of the Secretary of Defense expired on April 23, 1993.

E12.1.2. Joint duty credit for certain duty performed during Operations DESERT SHIELD and DESERT STORM was readdressed in Sections 931 and 932 of the FY 1994 National Defense Authorization Act codified at 10 U.S.C. 664(f) (reference (b)). Reference (b) authorized the Secretary of Defense to correct inequities in previous decisions and to consider new requests from officers who failed to submit a request due to operational missions. That authority of the Secretary of Defense expired on February 27, 1994.

#### E12.2. Implementation

E12.2.1. Any joint duty credit (full or partial) awarded to an officer may be applied under 10 U.S.C. (reference (b)). That includes qualification for promotion to O-7 under Subsection 664(f)(3) of reference (b) and recommendation for "JSO" designation under Subsection 661(b)(2) of reference (b).

E12.2.2. All officers granted partial joint duty credit were awarded 12 months of cumulative joint tour credit under title 10 U.S.C. 664(f)(3) (reference (b)).

E12.2.3. Persian Gulf joint duty credit is considered an initial assignment for officers with a COS under Subsection 664(c)(3) of reference (b). Therefore, the Secretary of Defense may not authorize a second JDA of less than the period prescribed by Subsection 664(a) of reference (b) without a tour length waiver or unless the officer is released according to enclosure 5, subsection E5.3.2. The period of service for determination of an officer's initial assignment is the period during Operations DESERT SHIELD and DESERT STORM for which the officer was granted joint credit and not the date credit was awarded by the Secretary of Defense.

E12.2.4. Officers covered by this enclosure shall not be counted under paragraphs 7, 8, 9, 11, or 12 of Section 667 and Subsections 662(a)(3) and (b) of reference (b) on the annual report to the Congress about promotion rate requirements and promotion policy objectives.

E12.2.5. For officers nominated for award of the “JSO” designation, the Secretary of Defense may waive the requirement that the officer perform a full tour of duty in a JDA after completion of PJE.

E12.2.6. Officers awarded either full or partial credit while serving in a JDA must complete their tour of duty in accordance with procedures outlined in enclosure 4 of this Instruction.

E12.2.7. JDAMIS has been updated to record award of full or partial joint duty credit, period served, and the officer's military occupational specialty code.

### E13. ENCLOSURE 13

#### JOINT DUTY CREDIT FOR CERTAIN JOINT TASK FORCE ASSIGNMENTS

##### E13.1. Eligibility Criteria

###### E13.1.1. General

E13.1.1.1. Section 501 of the 1996 National Defense Authorization Act, codified in 10 U.S.C. 664 (reference (b)) authorized the Secretary of Defense, with the advice of the Chairman of the Joint Chiefs of Staff, to award officers who serve in certain temporary JTF headquarters assignments, on a case-by-case basis, credit for completing a full JDA or credit countable for determining cumulative service in JDAs.

E13.1.1.2. Specific criteria for award of such credit is provided in section E13.1.2, below, and applies uniformly to each Military Department.

E13.1.2. Specific. All of the following criteria must be met to be eligible for award of joint duty credit under section 501, 1996 NDAA, enacted on February 10, 1996, and codified in 10 U.S.C. 664 (reference (b)).

E13.1.2.1. Must be an active duty officer not excluded from JDAs as provided in enclosure 3.

E13.1.2.2. Must have been assigned to a temporary position on the headquarters staff of a qualifying U.S. JTF that is part of a Combatant Command or the U.S. element of the headquarters staff of a multinational force. The JTF headquarters must be constituted or designated by the Secretary of Defense or by the commander of a Combatant Command or of another force. Duties performed must have:

E13.1.2.2.1. Been in support of a mission that is directed by the President or that was assigned by the President to the U.S. forces in the JTF involved.

E13.1.2.2.2. Included the conduct of combat or combat-related operations in a unified action under joint or multi-national command and control.

E13.1.2.2.3. Provided the officer significant experience in joint matters equivalent to experience gained from assignment to a JDA position (see enclosure 2, definition E2.1.7.).

E13.1.2.3. Must have served at least 90 consecutive days in a qualifying temporary headquarters assignment on or after February 10, 1996, and must be recommended for consideration by the Chairman of the Joint Chiefs of Staff.

## E13.2. Procedures

E13.2.1. Approved Qualifying Temporary Headquarters Assignments. The Chairman of the Joint Chiefs of Staff shall forward a list of positions that meet the criteria in section E13.1., above, to the ASD(FMP) for approval. Officers who serve in approved qualifying temporary headquarters assignments shall receive cumulative joint duty credit on completion of at least 90 consecutive days in the position, 1 day of which must have been served on or after February 10, 1996. The Chairman of the Joint Chiefs of Staff shall update that joint duty credit in JDAMIS. Only one officer may be assigned to each qualifying temporary headquarters assignment. A maximum of 30 days of overlap between arriving and departing officers is authorized. If the officer was not assigned to an approved qualifying temporary headquarters assignment, the procedures in subsection E13.2.2., below, apply.

E13.2.2. Recommendations for JTF Joint Credit When Position Not Preapproved. When an officer serves at least 90 consecutive days in a qualifying temporary headquarters assignment that meets the qualifications in section E13.1., above, that has not been approved by the ASD(FMP), as in subsection E13.2.1., above, JTF or U.S. Element Commanders may forward recommendations for JTF credit to the Military Departments. The Military Departments in turn forward the recommendations to the ASD(FMP) through the Chairman of the Joint Chiefs of Staff. The recommendations shall include the following information:

E13.2.2.1. Service Data. Name (last name, first name, and middle initial), grade or rank, social security number, Military Service, occupational specialty or MOS or AFSC (numerical designation), qualifying headquarters assignment information (billet, duty title, and military organization), dates of service and amount of credit earned.

E13.2.2.2. Justification. Include description of duty assignment, duty title of immediate supervisor, and detailed explanation of how significant experience in joint matters acquired.

## E13.3. Implementation

E13.3.1. For positions approved by the ASD(FMP) as qualifying temporary headquarters assignments, the Chairman of the Joint Chiefs of Staff shall credit officers who serve 90 or more consecutive days with cumulative credit, or full credit if the total service accumulated equals at least 2 years for GFOs and COS officers, and at least 3 years for all others. Appropriate credit shall be updated in JDAMIS.

E13.3.2. For all other positions, JTF and U.S. Element Commanders may submit individual recommendations when the criteria in section E13.1., above, is met for award of joint duty credit for qualifying temporary headquarters assignments.

E13.3.2.1. JTF and the U.S. Element Commanders submit individual recommendations to the Military Departments within 6 months of completion of the qualifying assignment or within 6 months of the effective date of the Instruction, whichever is later.

E13.3.2.2. The Military Departments review individual recommendations for award of joint duty credit for qualifying temporary headquarters assignments on receipt from the JTF or the U.S. Element Commanders and forward to the ASD(FMP) through the Chairman of the Joint Chiefs of Staff for approval. The Military Departments disapprove requests when the criteria in section E13.1., above, is not met.

E13.3.2.3. The Chairman of the Joint Chiefs of Staff reviews recommendations from the Military Departments to award joint duty credit for qualifying temporary headquarters assignments and forwards those that meet the criteria in section E13.1., above, to the ASD(FMP) for approval.

#### E13.4. Joint Officer Management Program Reports and Requirements

JDA credit awarded as under this enclosure is exempt from JDA promotion reports, minimum tour length requirements and Military Service tour length averages, assignment fill rates, and PJE sequencing requirements.